SiteManager Training Manual

Module A
Chapter 1

Contract Administration
Contract Records

Section A-2-8-1

Key Dates Adding, Modifying and Deleting

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Key Dates

A key date is a date that occurs once in the life of a Contract. When a key date occurs, a notification is sent to a selected recipient. SiteManager adds a set of default Key Dates automatically to each new Contract. In this window, a user may add a new Key Date, schedule a Key Date, enter the date of the actual occurrence and delete Key Dates that will not be used for a selected contract.

The following table of Key Dates comes from the Contract Finalization Procedure:

| Applies to Contract	Key Date	User Who Populates Actual Date	Required to Activate	Required to Finalize	Recipient
☐	Last Day of Work (105.15)	PE/S	N	Y	Area Engineer
☐	Final Acceptance (105.15)	AE	N	Y	District Office Review Officer
☐	First Day of Work (no ref.)	PE/S	N	Y	Area Engineer
☐	PE/S Contract Review is Complete	PE/S	N	Y	District Review Officer
☐	Substantial Completion (101.59)	PE/S	N	Y	District Review Officer
☐	Pre-final Inspection	PE/S	N	Y	norecip
☐	Punch List Items Completed (108.09)	PE/S	N	Y	Area Engineer
☐	Sod Maintenance Expired (621.10)	PE/S	N	Y	norecip
☐	Sod Repaired (621.10)	PE/S	N	Y	norecip
☐	Failed Material Replaced (105.03)	PE/S	N	Y	norecip
☐	Final Inspection (105.15)	PE/S	N	Y	Area Engineer
☐	Temp Traffic Contrl Devices Rem (108.09)	PE/S	N	Y	Area Engineer
☐	Authorized to Remove Signs (108.09)	PE/S	N	Y	Area Engineer

"Double-click" on the **Contract Administration (+)** icon located on the Main Panel.
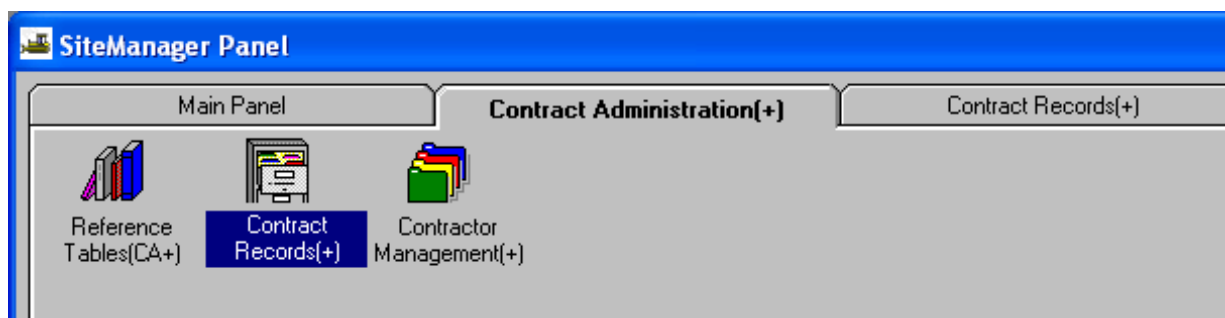
"Double-click" the **Contract Records (+)** icon.

"Double-click" on the **Key Dates** icon.
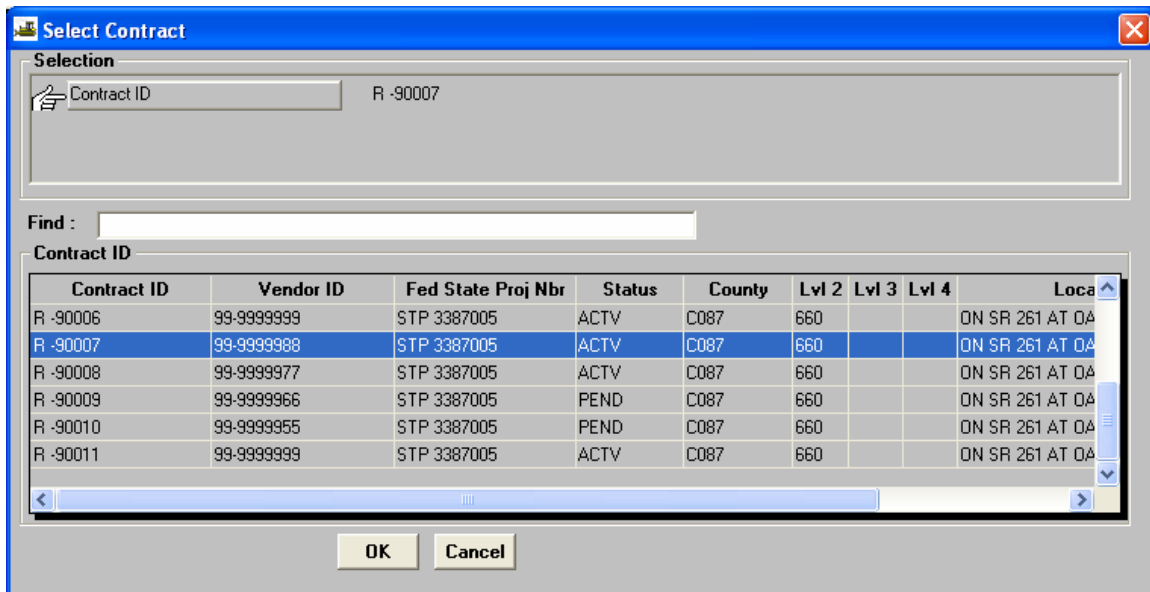
The Select Contract window opens.

The Bottom Panel contains the following columns:

- **Contract ID:** is the identification number assigned to the contract.
- **Vendor ID:** is the INDOT assigned identification number for the Prime Contractor.
- **Fed State Proj Nbr**: is the unique identifier for the project.
- **Status**: column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County**: column shows the county where the majority of the work is located.
- **Lvl 2**: The **Lvl 2** column indicates the District Office administering the contract.
- **Lvl 3:** The **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** The **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the actual work location.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract "Double-click" on the appropriate **Contract ID**.

This step will be skipped if a contract has previously been selected.

The Key Dates window lists the Key Dates for the selected Contract in the top panel.
The data for the selected Key Date is displayed in the bottom panel.

Adding a Key Date to a Contract

"Click" on the **New** ☐ button located on the toolbar.

"Click" **Key Date Type** drop-down list and select the appropriate **Key Date Type**.
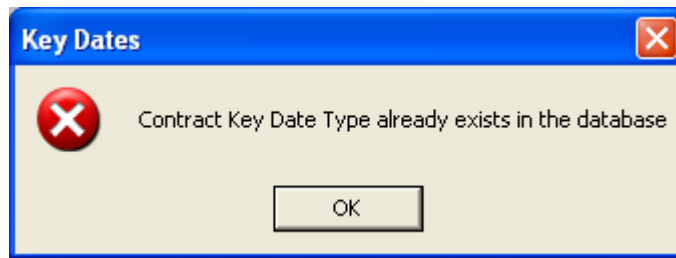
Each key date can be associated to a contact one time. If the key date that is being selected is already associated to the contract, then the "Contract Key Date Type already exists in the database" message will appear.

"Click" the **OK** button.

Projected Date: The **Projected Date** is the date the key date is targeted to occur.

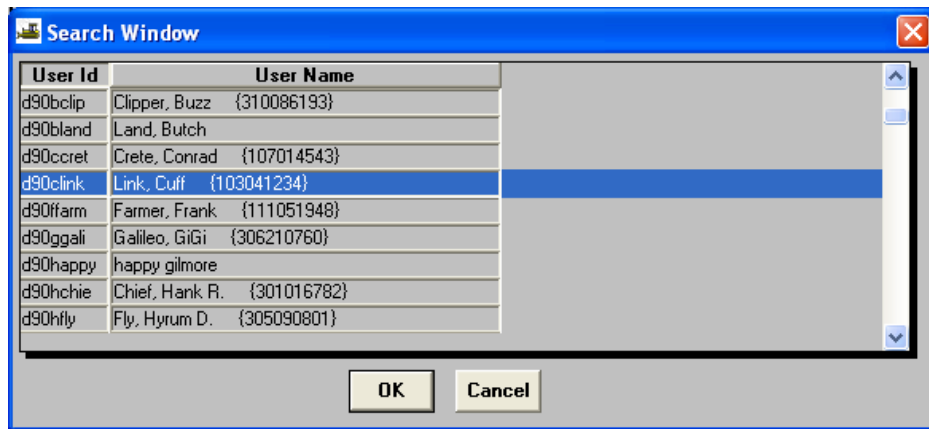"Enter" the appropriate date in the **Projected Date** field.

Actual Date: The **Actual Date** the event actually occurs. This date must be current or in the past. The Recipient is notified when this date is entered.

Required to Activate: Required to Activate indicates that a key date must occur before the Contract status can be changed from Pending to Active. A Key Date can not be both Required to Activate and Required to Finalize. Note: <u>Do not</u> check **Required to Activate.**

Required to Finalize: Required to Finalize indicates that the Actual Date of the Key Date must be populated before the contract can be finalized. These dates support the contract finalization procedure.

"Click" on the Required to Finalize checkbox, if appropriate.

Distribution List: will not be utilized by INDOT

Recipient: The **Recipient** is the User ID of a person to be notified that the event has occurred.
"Right Click" in the **Recipient** field.
"Click" on **Search.**

Use the Scroll or Find, Filter, Sort technique to locate the appropriate recipient.
"Double-click" on the appropriate **User Name**.

Message Text: Message Text is a message that will be sent to the Recipient via a SiteManager InBox notification when the Actual Date is populated. "Enter" a message in the **Message Text** field.

 "Click" the **Save** button located on the tool bar.

Modifying a Key Date

Select a Key Date to modify by "clicking" on the appropriate Key Date in the **Key Date Type** field in the top panel.

In the bottom panel:

Projected Date: The **Projected Date** is the date the Key Date is targeted to occur.

"Enter" the appropriate date in the **Projected Date** field, if applicable.

Actual Date: The **Actual Date** the event actually occurs. This date must be current or in the past. The Recipient is notified when this date is entered.

"Enter" the appropriate date in the **Actual Date** field, if applicable.

 Recipient: The **Recipient** is the User ID of a person to be notified that the event has occurred.

"Right Click" in the **Recipient** field.
"Click" on **Search.**

"Double-click" on the **User ID** of a person to be notified that the event has occurred.

Message Text: Message Text field contains information about the Key Date that is sent to the Recipient via the SiteManager In-Box when the Actual Date is populated and saved.   "Click" into the **Message Text** field and "enter" a message that will be sent to the Recipient.

"Click" the **Save** 🖫 button located on the toolbar.

Deleting a Key Date

Select a Key Date to delete by "clicking" on the appropriate Key Date in the **Key Date Type** field in the top panel.

 "Click" on the **Delete** button located on the toolbar.

"Click" the Yes button.

"Click" the **Save** 🖫 button located on the toolbar.

"Click" the **Close** 📂 button located on the toolbar.

A-2-8-1 Group Exercise

The contractor began work on 7/16/06 on R -90004. This information needs to be documented in the Key Dates.

Log into SiteManager as: <u>update</u>
Password: <u>pass</u>

"Double-click" on **Contract Administration**
"Double-click" on **Contract Records**
"Double-click" on **Key Dates**
"Click" the **Open** button
Contract ID   Select   <u>R -90004</u>
Key Date   Click   <u>First Day of Work</u>
Actual Date   Enter   <u>07/16/06</u>
"Click" on **Save** located on the toolbar
"Click" on **Close** located on the toolbar